

PART I

CHARTING OUR FUTURE: THE BACKGROUND

I. The Decision to Update *To Secure Our Legacy*:

On November 2, 2001, the North Carolina State Historical Records Advisory Board (SHRAB) held *Charting Our Future: The Statewide Conference on Records* at the Jane McKimmon Center on the campus of North Carolina State University. Over 120 representatives of archival, museum, library, academic, government, and historical organizations attended this day-long meeting, united by the desire to address major issues and challenges that confront records keepers throughout North Carolina and to explore avenues to meet those challenges. The presentations made by speakers at *Charting Our Future*, and the recommendations formulated by participants during the afternoon sessions of the conference, form the centerpiece of this needs/assessment report, which is offered to the citizens of North Carolina and to the National Historical Publications and Records Commission (NHPRC) in compliance with a grant from the NHPRC.

Charting Our Future was nearly two years in planning. In 1999 the SHRAB decided the time had come to update its 1993 needs/assessment planning document *To Secure Our Legacy: The Future of North Carolina's Documentary Heritage*. In the seven short years since its publication, there had been spectacular advances and changes in electronic technologies, including the multiplication of electronic media and resultant preservation issues. In addition, the increasingly difficult task of securing records funding, and the desire to explore additional means of support, convinced the board that a planning update for North Carolina was necessary. Accordingly, the board submitted a proposal for a needs/assessment process that would lead to a statewide conference on records in early November 2001. The NHPRC accepted this proposal, and in the spring of 2000 the board began planning in earnest for the conference.

II. Survey of Records Repositories:

A primary instrument of this process would be a survey of the state's records keeping institutions and organizations. On August 4, 2000, the SHRAB sent to some 400 institutional representatives its prepared Survey of Records Repositories, which was created not only to measure and evaluate traditional problems and issues confronting archivists, local government officials, and librarians, but also to include a number of queries concerning information technology (IT) issues. Over the next few months 227 institutions and organizations from across North Carolina responded to the survey; these results were tabulated using Microsoft Access and eventually were made available to all participants in *Charting Our Future* and are included in this report [see Appendix B].

The results of the SHRAB survey revealed that while progress had been achieved since the publication of *To Secure Our Legacy*, much work remained to be done to bring the Tar Heel State's repositories into the twenty-first century. While some institutions were adjusting to the "electronic age" and implementing programs to digitize some of their collections and make them available to the public, other organizations remained years behind. Staffing issues, financial problems, and space considerations continued to plague most respondents, while a whole new set of questions relating to IT issues now confronted records keepers---electronic records lifecycles, needed standards of practice, interoperability, digitization, and staff (re)training, to name but a few.

Of the 227 institutions responding, 158 had professional staff employed; the remainder depended on unpaid and volunteer nonprofessionals. Only a quarter of the organizations and institutions had annual budgets of over \$100,000; nearly a quarter had yearly budgets of less than \$1,000. Only about 40 percent of respondents had designated stack areas for maintaining